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SURVEY OF THE WORLD WOOL POSITION

This paper on the world wool situation is submitted, as on former occasions, as a factual study of postwar trends in world production, consumption, stock formation and prices. The statistics have been compiled by the Commonwealth Economic Committee and for the postwar years have been based on the results of the annual questionnaire issued jointly by the Commonwealth Economic Committee and the International Wool Textile Organization. Data on stocks have been taken from statistics supplied by the U.K.-Dominion Wool Disposals Ltd. The price series is the one regularly published by the U.K.-Dominion Wool Disposals Ltd. For the sake of uniformity all data on quantities of wool have been presented on a clean basis except for production which is given on a greasy basis. The world total for each season, as well as for the breakdown into merino, crossbred, apparel type and carpet type wool, however, is also given on a clean basis. The conversion factors from greasy to clean basis which have been used are those determined by a special sub-Committee of the Commonwealth Economic Committee Wool Statistics Advisory Committee.

SUMMARY

The first estimate of world production of wool during 1950-51 shows an increase of one percent to 2,281 million lbs. (clean). Of this amount 725 million lbs. will consist of merino type wool and 1,140 million lbs. of crossbred making the output of apparel type wool 1,865 million lbs. (clean) against 1,850 million lbs. in 1949-50 and 1,658 million lbs. in 1934-38.

This statistical paper is reproduced as a service to U.S. wool interests. Some differences exist between these statistics and those normally published by the U.S. Department of Agriculture. The chief difference lies in the manner in which the Northern and Southern Hemisphere clips are combined. In June each year the Department summarizes world wool production by combining an estimate of the Northern Hemisphere clip with the percent of the clip for the season beginning July 1 or October 1 of the same year in the Southern Hemisphere.

World consumption of wool in 1949 declined by six per cent. to 2,368 million lbs.(clean), but during the first half of 1950 it has increased sharply to an annual rate of 2,625 million lbs. Supply stocks, that is, marketable stocks in the hands of the Joint Organization, the United States Government, the United Kingdom Government and exporting countries, have declined from 2,255 million lbs. (clean) on 1st July, 1945, to 144 million lbs.on 1st July, 1950. Thus during the five years, current clips have been augmented by a total of 2,111 million lbs. from supply stocks. No accurate figures exist for world trade stocks but they have been calculated to total at least 1,536 million lbs.(clean) including work in hand, or 1,024 million lbs. excluding work in hand. This latter figure is thought to be the more reasonable estimate, and it represents 21 week's supply at the current rate of consumption.

WORLD PRODUCTION

Since the end of the war, world production has expanded steadily each season with one exception, 1947-48. Last season (1949-50) the world clip has been estimated at 3,938 million lbs.(greasy basis) or nearly 100 million lbs.more than the provisional estimate submitted to the third meeting of the Study Group (Table I). This figure is also some 150 million lbs.more than the immediate prewar average, but still some 320 million lbs.less than the peak output reached in 1941-42. The current clip is expected to increase to 3,979 million lbs. (greasy) and judging from past experience this figure may have to be revised upwards. On a clean basis the 1949-50 clip is put at 2,257 million lbs.which is 200 million lbs.larger than before the war but 100 million lbs.less than in 1941-42. The current clip is estimated at 2,281 million lbs.(clean), a rise of one per cent on the year.

Output in Australia has been rising quite sharply in the past three seasons--though mainly the increases constitute recovery from heavy drought losses--and this year it is expected to reach an all-time record, exceeding the previous peak of 1943-44 by 21 million lbs. Sheep numbers are the highest since the drought of 1944-45. Both the New Zealand and South African clips, however, are expected to show a slight decline this season according to their provisional estimates. Last season's clip in South Africa proved to be 5 million lbs. larger than at first expected, but the recovery which took place in 1948-49 has not been maintained. Wool production in Argentina is reported to have increased quite modestly, after the effects of the drought two seasons ago, but Uruguayan production has been included at its last season's level. The clip of the Soviet Union which has been assumed to increase by 20 million lbs.(greasy basis) each year for the past three seasons, is put at 310 million lbs.or 90 million lbs. more than the prewar average but 40 million lbs.less than its peak of 1941-42. As no data are received from the Soviet Union, these estimates cannot be considered very reliable. Output in the United States has increased by 2 million lbs. to 267 million lbs.owing to a heavier yield of fleece. The significance of this rise lies in the fact that it is the first increase recorded after a continuous and sharp decline during the past 8 years.

The world merino clip for the current season is estimated at 1,367 million lbs. (greasy basis), an increase of only 14 million lbs. on the year. This total is 26 million lbs. less than the immediate prewar average and nearly 200 million lbs. less than in 1941-42. On a clean basis, however, the merino clip is put at 725 million lbs. or 70 million lbs. more than before the war owing to the increase in the estimated clean yield of the postwar clips. Nevertheless, the clip will be 40 million lbs. less than in 1941-42. The output of crossbred wool is expected to increase both on greasy and clean basis for the third successive season. This season's figure (1,781 million lbs. greasy or 1,140 million lbs. clean) is substantially larger than its prewar average and is approaching its peak of 1941-42.

Total apparel type wool in 1950-51 is estimated at 3,148 million lbs. greasy basis (1,865 million lbs. clean), which represents an increase of 24 million lbs. (15 million lbs. clean) on the season and of over 150 million lbs. (nearly 200 million lbs. clean) on its 1934-38 average.

The production of carpet type wools has been estimated on the basis adopted by the Wool Statistics Advisory Committee of the Commonwealth Economic Committee. A change, however, has been made in converting the prewar average clip from a greasy to a clean basis. The estimate for this season puts output at 831 million lbs. (greasy) compared with 797 million lbs. before the war. The corresponding clean equivalents are 416 million lbs. and 400lbs respectively.

The provisional estimate of wool production in the five principal exporting countries (Table II) shows only a slight rise this season - by 7 million lbs. to 2,417 million lbs. (greasy basis). The increase in output in Australia and Argentina only just offsets the decline in New Zealand and South Africa. Merino production, however, has risen by 13 million lbs. to 1,209 million lbs. (greasy) while crossbred production has declined by 8 million lbs. to 1,026 million lbs. (greasy).

Production in the six principal importing countries (Tables III) which has been declining since the end of the war, shows an increase of 25 million lbs. this season to a total of 759 million lbs. (greasy). The main contribution to this increase comes from the Soviet Union, though output in the United States, United Kingdom and Germany has also expanded modestly. Most of the wool produced in these importing countries continues to be of the crossbred type.

WORLD CONSUMPTION

The statistics on world consumption of wool (Table IV) are submitted this year on a calendar year basis, and the figures differ slightly from those given at the previous meetings. The present series is based on data returned on the joint questionnaire. It covers actual figures or estimates for 48 countries. Actual returns as distinct from estimates cover 75 percent of the total; a further 15 percent of the total consists of estimates based on available supplies. The new series is therefore considered reasonably reliable.

Since the war, the level of wool consumption in the United States has tended to dicate the world trend and this fact was clearly demonstrated in 1949

when United States consumption declined by 28 percent and world consumption by 6 percent to 2,368 million lbs.(clean). Many other countries also experienced a decline. The consumption in the United Kingdom, however, continued to increase and the United Kingdom regained its prewar position of world's largest wool consumer for the first time since the war. German consumption also increased very sharply in 1949, though the level is still barely half of its prewar average. Despite the sharp decline in world consumption last year, the total was still 310 million lbs. (clean) more than between 1934 and 1938.

Activity in the United States' wool textile industry began to recover half way through 1949 but the increased consumption of wool in the second half of the year was not sufficient to offset the reduction in the first six months. Nevertheless, United States' consumption in the first half of 1950 has continued to increase and so has wool consumption in the United Kingdom, though the quantity used in the first six months of 1950 was less than in the United States. Monthly consumption statistics are only available for a few countries; for the remainder estimates have been made based on available supplies and the level of activity in the various national wool textile industries. But it is clear that the rise in activity in the United States and the United Kingdom has been reflected in many other countries. On the basis of these data, the current annual rate of consumption during the first half of 1950 has been of the order of 2,625 million lbs. (clean) or 95 million lbs more than the peak of 1948, and 567 million lbs more than between 1934 and 1938. In other words, world consumption this year has been running at a level of more than 25 percent higher than before the war.

Since the war, world consumption has been substantially higher than world production; the excess has fluctuated between 180 and 410 million lbs.(clean) a year (Tables V and VI). No accurate split between consumption of apparel type and carpet type wools has been possible. Data are available for only two countries - the United Kingdom and the United States. In Table VI, it has been assumed that the whole output of carpet type wool during any season has been consumed in the calendar year commencing in the second half of the season, and these figures have been deducted from the total world consumption for each year to arrive at the consumption of apparel type wools. This method is not statistically satisfactory, but it is at least defensible on the grounds that the compilation of world production of carpet type wool is largely an arbitrary one and therefore any margin of error introduced into the production estimates will tend to be offset by including them on the consumption side.

It is worth noting that the countries which report wool consumption directly are those which have a highly organized wool textile industry. For the remainder in which accurate statistics are not compiled nationally the estimate of consumption is based on available supplies and therefore any error which may exist in the production estimate is automatically included in the consumption estimate and in that way tends to cancel out. Again, consumption in those countries reporting directly refers to "mill consumption"; in all other countries it refers to "total consumption".

WORLD STOCKS OF APPAREL WOOL

Unfortunately no adequate statistics exist for stock formation, but some indication of the trend can be obtained from the data on world production and consumption which have in fact been compiled separately. Detailed figures exist for "supply stocks" held by the Joint Organization, the United States Government and the United Kingdom Government and fairly reliable estimates can be made for exporters stocks. Table VII shows the composition of these supply stocks at the beginning of each season from 1945 to 1950. The reduction in stocks from one season to the next gives the net off-take which has augmented the current clip. In 1949-50, for example, the net off-take was 368 million lbs. (clean) against 196 lbs. in the previous season.

One method of calculating trade stocks assumes that the opening estimate of 410 million lbs. (clean), as estimated by the Joint Organization as of the end of June, 1945, was the reserve of wool held by the trade, rather than the total stock of wool, including that in manufacturers' hands, on which their tempo of production depended. From total purchases for each season (new clip plus off-take from supply stocks) is deducted actual consumption in the calendar year beginning in the second half of each season. The difference between purchases and actual consumption reflects the changes in trade stocks. The resultant picture (Tables IXA and B) would seem to accord more with facts as known about the wool textile industries in the postwar years. Trade stocks were built up in the first season, then fell quite sharply, but in 1947-48 and 1948-49 only modestly, whilst in 1949-50 consumption equalled purchases. On this basis world trade stocks are of the order of 1,024 million lb. (clean).

The total available supply for 1950-51 is 2,370 million lbs. (clean), made up of 2,281 million lbs. new clip and 89 million lbs. from stocks held by Joint Organization and the United States Government. This quantity is 90 percent of the current annual rate of consumption. If consumption is to be maintained at its current level trade stocks would have to be reduced by 255 million lbs. If current world trade stocks are taken at 1,024 million lbs., then twelve months hence they would, on this hypothesis, be reduced to 769 million lbs. which at the current rate of consumption would represent something like 15 weeks' supply, compared with the present stock of 21 weeks' supply.

It is, unfortunately, not known what is considered the minimum size of trade stocks to maintain a given level of production. That figure will clearly differ from country to country and indeed from factory to factory, depending to some extent on the complexity of the industry, on the organzation of the factory, on the efficiency of the management and also on the time taken to transport supplies from producers to consumers. On 1st April, 1950, total stocks of apparel wool (including Government-held stocks) in the United States had declined to 17 weeks' supply, compared with a prewar average of 21 weeks' supply. From these figures it would seem that trade stocks at that time amounted to 16 weeks' supply, and the level of production was apparently not affected. It is, however, probable that the minimum stock for other countries would have to be put at a somewhat higher figure. For purposes of calculation it may be noted that a twenty week stock at the current rate of consumption would amount to 1,010 million lbs. (clean).

Prices for Dominions Wool

The series of monthly quotations for standard qualities of Dominions wool regularly published by the Joint Organisation is again included in this year's Survey in Table X. The opportunity has been taken to show the prices in every month in which representative sales have been held since auctions were restarted in September 1946.

The trend of prices for all qualities has been markedly upwards since the last meeting of the Study Group, with only temporary halts for merinos in the early part of February 1950 and the middle of June 1950 and for medium crossbreds in December, 1949 (when the very strong opening of the New Zealand season was not quite maintained) and also in February and June 1950. Between July 1949 and June 1950 the rise in merinos (60's, 64's and 70's) was over 50%, in fine crossbreds (56's and 58's) it was about 70%, and in medium crossbreds (46's, 48's and 50's) it was 100%. The ratio of prices for 64's and 46's, which in 1948-49 had been 3 to 1 and sometimes even as much as 3½ to 1, narrowed considerably from September, 1949 onwards, and from January to June 1950 it remained close to 2½ to 1. This compares with a ratio of just under 2½ to 1 taking the average of the average of the whole inter-war period 1919/39 and of 2 to 1 in the period 1934-38 The change in this ratio indicates how the heavy concentration of demand on merino wools after the war has, during the last season, been spread to all wools. Part of the new demand for medium crossbred has come from carpet manufacturers as a result of the growing scarcity of traditional carpet-type wools and the effect of this can be particularly seen in the narrowing of the margin between prices for 50's, 48's and 46's, which have often sold with practically no difference between them (and even with 46's slightly higher than 48's.)

The 1950-51 season has, of course, opened with a further remarkable advance in prices. In Australia and South Africa the opening prices for merinos were close on 50% above June, and this new level has been maintained for the first four weeks of the season with minor variations from day to day both up and down. Very recently a tendency for prices to decline very slightly has been reported. Only merino wools and a relatively small quantity of fine crossbreds have so far been offered in Australia and South Africa; the New Zealand season does not open until November. The London September sales opened a fortnight ago, and besides confirming the values of fine wools established in the primary markets with a substantial spot premium in addition, they showed an advance on medium crossbreds of over 100% above June and of over 250% above a year ago. It should be stressed that the quantities so far sold are relatively small and the recent level of prices still awaits a full testing.

STATISTICAL NOTES

The statistics on production and consumption of wool are based on the results of the annual questionnaire organized jointly by the Commonwealth Economic Committee and International Wool Textile Organization and on returns made by certain governments and organizations directly to the Commonwealth Economic Committee.

World Production (Tables I, II, III and V)

World production is compiled on a greasy basis from data supplied by (or in a few cases estimated for) individual countries and the total is a summation of these individual figures. Production includes pulled wool and the wool content of exported sheepskins converted to a greasy basis.

The subdivision of apparel and carpet type wools is calculated by the method proposed by the Wool Statistics Advisory Committee of the Commonwealth Economic Committee and is not based on count numbers.

The clean yield is calculated from the world totals and not from individual countries. The factors used are a weighted average for the five chief exporting countries. Carpet type wool is converted at 50 percent.

World Consumption: (Tables IV and VI)

World consumption figures are also the summation of data for individual countries. The total number covered is 48. (i) Countries making direct returns cover 75 percent of the total. These countries are those which have a well organized wool textile industry and their figures refer to mill consumption. (ii) For certain countries consumption is derived from estimates of available supply and fitted into the general trend of consumption; their aggregate consumption accounts for 15 percent of the world total. Many of these countries possess "home industries" and their consumption figures relate to total consumption rather than mill consumption. Again for some of these countries, no accurate wool production figures exist. But since the estimate for domestic output is used to calculate available supplies, any error on the production side is equally reflected in consumption and therefore tends to cancel itself out. (iii) For a few remaining countries such as India, Pakistan and China, a fixed estimate for consumption is used. These countries account for 10 percent of the worlds total.

The figures for world consumption are considered reasonably reliable particularly when used in conjunction with the figures for world production. The probable maximum range of error for the estimates of world consumption (assuming that all data returned and agreed upon are correct) has been calculated as plus 3 percent and minus 3½ percent.

Statistics on consumption are reported for calendar years. The seasonal consumption figures in Table VIII have been derived from the annual figures by taking the half of one year with the half of the next. World consumption in the last half of 1945 has been calculated at 800 million lbs. (clean.)

Consumption of carpet type wools in Table VI has been assumed to be the same as production. The Consumption of apparel type wools has been derived by deducting the consumption of carpet type from the world totals. In making this division between apparel type and carpet type wools (which is a purely arbitrary one unless it were possible to calculate both production and consumption on a count basis) the important thing is to use the same method of assessment for consumption as for production.

Stock Formation: (Tables VII, VIII and IX A and B)

The data in Table VII have been supplied by the U.K.-Dominion Wool Disposals Ltd. (the Joint Organization). They show the offtake each season from world supply stocks which has augmented the seasonal clip.

8 The balance sheet in Table VIII (omitted) has been drawn up by using seasonal supply figures and seasonal consumption figures. The resultant estimate of world trade stocks is not considered satisfactory, since it is clear that the figures include quantities used to replenish pipe lines and working stocks in manufacturers' hands.

Tables IX A and B show trends in world trade stocks calculated by a different method. It assumes that the purchases in any one season are to cover production and stock formation (if any) in the calendar year beginning in the second half of the season. It therefore ignores consumption in the second half of the season. It therefore ignores consumption in the second half of 1945 on the grounds that it is met by purchases made prior to that time. In the same way, it offsets consumption for the whole of 1950 (based on the first six months of that year) against the total available supply for 1949-50. If the replenishment of production pipe-lines and work in hand after the war is assumed to be of the order of 500 million lbs. (a direct estimate of this quantity comes to nearly 450 million lbs.), then this quantity would account for the difference between the estimates shown in Tables VIII and IX.

TABLE I - Estimated world production of raw wool

million lb. - greasy basis

	Average 1934-38	1941-42	1946-47	1947-48	1948-49	1949-50 a	1950-51 a
Australia	995	1,167	977	973	1,031	1,165	1,190
New Zealand	300	345	367	362	367	390	372
South Africa b	261	269	221	215	227	225	220
India	96	80	55	55	55	55	55
Pakistan			24	24	24	24	24
United Kingdom	111	99	93	74	79	88	90
Canada	18	15	17	14	12	10	10
Other Commonwealth	10	8	9	9	8	8	8
Irish Republic	17	16	15	13	12	12	12
United States c	451	475	362	329	296	265	267
Argentina	376	497	493	495	460	475	480
Soviet Union	219	350	237	250	270	290	310
Uruguay d	114	117	174	150	155	155	155
France	53	38	33	34	35	35	35
Roumania	45	31	26	26	30	32	32
Spain	60	79	69	72	88	75	75
Turkey	52	74	69	71	75	71	73
Germany e	39	41	9	9	10	8	9
Italy	31	33	27	30	32	35	35
Brazil	39	41	45	48	45	47	45
Yugoslavia	33	34	30	30	30	32	35
French Morocco	42	50	20	25	26	28	30
Chile	33	36	33	32	35	35	37
Other Europe	113	96	96	104	115	114	115
Other Africa	37	37	33	32	32	30	30
Other Asia	199	190	187	189	189	190	190
Other America	44	42	44	44	44	44	45
TOTAL	3,788	4,260	3,765	3,709	3,782	3,938	3,979
Of which -							
Merino	1,393	1,561	1,201	1,211	1,261	1,353	1,367
Crossbred	1,598	1,826	1,789	1,707	1,714	1,771	1,781
Apparel type	2,991	3,387	2,900	2,918	2,975	3,124	3,148
Carpet type	797	873	775	791	807	814	831
Clean equivalent -							
Merino	655	765	613	630	656	717	725
Crossbred	1,003	1,150	1,145	1,092	1,097	1,133	1,140
Apparel type	1,658	1,915	1,758	1,722	1,753	1,850	1,865
Carpet type	400	437	388	396	404	407	416
WORLD TOTAL	2,058	2,352	2,146	2,118	2,157	2,257	2,281

a Provisional.
b Including Basutoland and S.W. Africa Territory
c Pulled wool converted to a greasy basis.
d Including Baltic Republics of Estonia, Lativa, and Lithuania.
e Bizone only from 1946-47.

Source: Commonwealth Economic Committee.

TABLE II - Wool Production of Five Principal Exporting Countries

million lb. - greasy basis

	1934-35 - 1938-39				1941-42				1945-46				1946-47			
	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total
Australia	819	176	-	995	951	216	-	1,167	722	214	-	936	675	302	-	977
New Zealand	8	292	-	300	8	337	-	345	8	357	-	365	8	359	-	367
South Africa	254	-	7	261	250	-	19	269	197	-	20	217	201	-	20	221
Argentina	51	194	131	376	65	266	166	497	70	241	156	467	82	247	164	493
Uruguay	15	99	-	114	18	99	-	117	23	152	-	175	30	144	-	174
TOTAL	1,147	761	138	2,046	1,292	918	185	2,395	1,020	964	176	2,180	996	1,052	184	2,232

	1947-48				1948-49				1949-50				1950-51			
	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total
Australia	706	267	-	973	765	266	-	1,031	874	291	-	1,165	893	297	-	1,190
New Zealand	11	351	-	362	12	355	-	367	12	378	-	390	11	361	-	372
South Africa	196	-	19	215	206	-	21	227	203	-	22	225	198	-	22	220
Argentina	83	247	165	495	77	230	153	460	80	237	158	475	80	240	160	480
Uruguay	26	124	-	150	27	128	-	155	27	128	-	155	27	128	-	155
TOTAL	1,022	989	184	2,195	1,087	979	174	2,240	1,196	1,034	180	2,410	1,209	1,026	182	2,417

Source: Commonwealth Economic Committee

TABLE III WOOL PRODUCTION IN PRINCIPAL IMPORTING COUNTRIES

million lb. - greasy basis

	1934-38				1941-42				1945-46				1946-47			
	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total
United Kingdom	-	111	-	111	-	99	-	99	-	89	-	89	-	93	-	93
United States	226	225	-	451	238	237	-	475	201	201	-	402	181	181	-	362
France	8	45	-	53	5	33	-	38	4	30	-	34	4	29	-	33
Italy	-	31	-	31	-	33	-	33	-	27	-	27	-	27	-	27
Belgium	-	1	-	1	-	1	-	1	-	1	-	1	-	1	-	1
Germany	12	27	-	39	14	27	-	41	7	13	-	20	8	15	-	23
Soviet Union	-	146	73	219	-	234	116	350	-	153	77	230	-	158	79	237
TOTAL	246	586	73	905	257	664	116	1,037	212	514	77	803	193	504	79	776

	1947-48				1948-49				1949-50				1950-51			
	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total	Merino	Crossbred	Other	Total
United Kingdom	-	74	-	74	-	79	-	79	-	88	-	88	-	90	-	90
United States	165	164	-	329	148	148	-	296	133	132	-	265	134	133	-	267
France	4	30	-	34	4	31	-	35	4	31	-	35	4	31	-	35
Italy	-	30	-	30	-	32	-	32	-	35	-	35	-	35	-	35
Belgium	-	1	-	1	-	1	-	1	-	1	-	1	-	1	-	1
Germany	8	15	-	23	8	17	-	25	7	13	-	20	7	14	-	21
Soviet Union	-	167	83	250	-	180	90	270	-	193	97	290	-	207	103	310
TOTAL	177	481	83	741	160	488	90	738	144	493	97	734	145	511	103	759

Source: Commonwealth Economic Committee.

TABLE IV - Total World Consumption of Virgin Wool
million lb. - clean basis

	1934-38 average	1946	1947	1948	1949	Annual rate 1950 /
United Kingdom	435	393	443	494	502	548
United States	330	738	698	693	500	628
France	232	214	256	256	231	250
Germany	180	30	40	47	91	120
Japan	108	19	9	5	8	25
Belgium	60	65	75	61	59	75
Italy	57	80	130	136	125	120
Spain	35	37	36	33	30	33
Poland	35	20	29	34	39	40
Czechoslovakia	24	14	34	20	15	17
Canada	20	41	42	35	30	26
Austria	13	4	8	12	13	15
Switzerland	12	18	20	18	15	15
Sweden	11	23	26	33	29	30
Netherlands	10	32	39	39	40	36
Portugal	10	13	14	13	10	10
Turkey	20	39	40	40	40	40
U.S.S.R.	180	140	155	170	195	200
Australia	35	66	70	80	75	70
New Zealand	4	8	7	7	8	8
South Africa	1	6	7	9	11	12
Argentina	36	56	72	80	87	85
Uruguay	3	7	8	8	10	10
Other Europe	89	59	68	66	70	75
Other Africa	12	20	21	22	21	22
Other America	31	53	51	46	44	45
Other Asia	75	70	73	73	70	70
Total	2,058	2,265	2,471	2,530	2,368	2,625

/ estimated on basis of first six months of the year.

Source: Commonwealth Economic Committee and
International Wool Textile Organization.

TABLE V: World Production of Raw Wool
- million lb., clean basis -

	Prewar	1945-46	1946-47	1947-48	1948-49	1949-50	1950-51
Apparel type	1,658	1,697	1,758	1,722	1,753	1,850	1,865
Carpet type	400	387	388	396	404	407	416
Total	2,058	2,084	2,146	2,118	2,157	2,257	2,281

Source: Commonwealth Economic Committee

TABLE VI: World Consumption of Raw Wool (Calendar year)
- million lb., clean basis -

	Prewar	1946	1947	1948	1949	1950 *
Apparel type	1,658	1,878	2,083	2,134	1,964	2,218
Carpet type	400	387	388	396	404	407
Total	2,058	2,265	2,471	2,530	2,368	2,625

* Estimated on basis of first six months of the year.

Source: Commonwealth Economic Committee and
International Wool Textile Organization

TABLE VII Off-take from Supply Stocks
million lb. (clean basis)

As at 1st July	1945	1946	1947	1948	1949	1950	1951*
Joint Organization	1,780	1,027	809	576	304	84	-
U.S. Government	175	240	220	70	55	5	-
U.K. Government (Brit. wool)	50	21	7	7	6	5	5
S. American Exporters	250	70	70	55	122	50	50
Excess Carry-over in Australia	-	-	-	-	25	-	-
TOTAL	2,255	1,358	1,106	708	512	144	55

	1945-46	1946-47	1947-48	1948-49	1949-50	1950-51
NET OFF-TAKE PER SEASON	- 897	- 252	- 398	- 196	- 368	- 89

*Forecast

Source: U.K.-Dominion Wool Disposals Ltd.

TRADE IXA TREND IN TRADE STOCKS
(Apparel wool only has been taken - see Tables V and VI)

million lbs. - clean basis

	1945-46	1946-47	1947-48	1948-49	1949-50	1950-51
Seasonal Purchases:						
New clip: (Apparel wool)	1,697	1,758	1,722	1,753	1,850	1,865
off-take from supply stocks	897	252	398	196 Y	368	89
Total purchases	2,594	2,010	2,120	1.949	2,218	1,954
Actual Consumption ※ (apparel wool)	1,878	2,083	2,134	1,964	2,218/	-
Net increase (/) in trade stocks	/ 716	-	-	- 15	-	
Net decrease (-) stocks		- 73	- 14			

Total net increase in trade stocks throughout period 614
Add initial trade stock at 1 July, 1945 410
Total Trade Stock 1,024
(excluding work in hand, etc.)

※ for calendar year commencing in second half of the season.

/ estimate based on first six months of 1950.

Source: Commonwealth Economic Committee.

TABLE IXB TREND IN TRADE STOCKS
(All wool - apparel and carpet types)

million lbs. - clean basis

	1945-46	1946-47	1947-48	1948-49	1949-50	1950-51
Seasonal Purchases:						
New clip	2,084	2,146	2,118	2,157	2,257	2,281
Offtake from supply stocks	897	252	398	196	368	89
Total Purchases	2,981	2,398	2,516	2,353	2,625	2,370
Actual consumption /	2,265	2,471	2,530	2,368	2,625 x	
Net increase (/) in trade stocks /	716				-	
Net decrease (-) stocks		- 73	- 14	- 15		
Trade stocks at beginning of period	410	1,126	1,053	1,039	1,024	1,024
Weeks' supply	-	26	22	21½	21	21

/ for calendar year commencing in second half of the season.

x estimate based on first six months of 1950.

Note: The changes in stocks in this table are the same as in Table IXA since the consumption of carpet type wools has been taken as the same as production.

Source: Commonwealth Economic Committee.

TABLE IX

PRICES FOR DOMINIONS WOOL

Pence per lb. clean cost delivered U.K.

		Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	April	May	June
1946/47	June x										
70's	38 3/4	45 1/4	47 1/2	50	51 1/2	46 1/2	49 3/4	54 1/2	57 1/2	58	59 1/4
64's	37	42	43 1/4	43 3/4	46	45 1/2	47 1/4	51	55 1/4	56 1/2	54 3/4
60's	35 1/4	39 1/2	39 1/2	40	42	42 1/4	44 1/2	49 1/2	52 1/4	53 1/4	51 3/4
58's	34	39	37 3/4	37 1/4	36 3/4	36 1/2	41 1/2	42	46	46 1/2	46
56's	31 1/2	33 1/4	35	34 1/2	32 3/4	35 1/2	36	36	36 1/2	37	36 1/4
50's	25 1/4	28 3/4	28 3/4	28 1/4	27 1/2	28 3/4	28 1/4	27 3/4	28	28	26 3/4
48's	24	26 3/4	26 1/2	25 3/4	25	26 1/2	26	26	26	26 1/4	25 1/2
46's	22 1/2	26 1/2	26	25 1/2	24	26 1/4	25 1/2	25 1/2	25 3/4	26 1/4	24 1/2
1947/48	July										
70's	68	75	75	77	77	87	93 1/2	81	93 1/2	102	114
64's	65	72	72	72	72	82	88 1/2	79	87	97	106
60's	61	69 1/2	67	67	67	74	79 1/2	67 1/2	77	87	96
58's	53 1/4	58 1/2	58 1/2	57	57	63	63	55 1/2	61 1/2	72	72
56's	38 1/2	45 1/2	46	46	46	51	51 1/2	43 1/2	46 1/2	49 1/2	50
50's	28	31	32	35 1/2	35 1/2	37 1/2	36 1/2	26 1/2	33 1/2	33 1/2	33 1/2
48's	26 1/2	29	30 1/2	31 1/2	31 1/2	34 1/2	33 1/2	25 1/2	30 1/2	31 1/2	30
46's	25 1/2	26 1/2	28 1/2	30	30	33	31 1/2	25 1/2	29 1/2	30	29
1948/49											
70's	111	105	105 1/2	109	109	115	114	109	96	98	100
64's	104	95	93 1/2	98	99	103	105	101	87	89	92
60's	91	84	83	87	90	93 1/2	96	92	80	31	84
58's	65	60 1/2	59 1/2	64	76	72	75	74 1/2	68 1/2	63	65 1/2
56's	48	49	50	55	62	59	57 1/2	55	49	51	51
50's	32	32	33	36	41 1/2	42 1/2	39	35	34 1/2	33	33
48's	29	30	30 1/2	33 1/2	37 1/2	41 1/2	38	33 1/2	32 1/2	32	32
46's	28 1/2	29	29 1/2	32	36	40	37	33	32	31	31
1949/50											
70's	99	96	107	114	116	135	134	134	141	151	146
64's	90	88	100	106	109	127	125	127	135	145	140
60's	85	83	95	101	101	117	111	118	123	135	131
58's	64	68	78	84	85	98	89	90	103	111	104
56's	51	58	64 1/2	70	71	84	75	75	85	91	81
50's	32 1/2	38 1/2	44 1/2	57	52 1/2	61	54 1/2	57	62 1/2	67	63
48's	31 1/2	37	42 1/2	54	48	58 1/2	52	55	60 1/2	65	61 1/2
46's	31	36	41	51 1/2	47	57	53	55	62	65 1/2	65

		London Sales September 21/22.	Australian-South African Sales: September
1950/51	July		
70's	156	232	227
64's	151	225	209
60's	141	210	190
58's	111	168	165
56's	90	148	-
50's	72 1/2	137	-
48's	71 1/2	134	-
46's	72	133	-

x Last month of sales at fixed prices

Source: U.K.-Dominion Wool Disposals Ltd.

FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FW 1-51

March 19, 1951

MOVEMENT OF WOOL FROM SOUTHERN HEMISPHERE

Less wool moved from the 5 principal Southern Hemisphere countries in the 1950-51 season through December than for the same period in the 1949-50 season. The reduction in exports amounted to almost 14 percent, reflecting the depletion of wool stocks that accumulated during World War II. Henceforth exports will depend upon the current clips.

Of the total wool exports from the 5 principal countries for the 1950-51 season through December, 158 million pounds actual weight were destined for the United States, according to preliminary data available to the Office of Foreign Agricultural Relations. This is a decrease of about 6 percent from the movement to this country for the same period last year and is about 50 percent larger than exports to the United States from the chief supplying countries two years ago. The quantity this season however is well below the level for the immediate postwar years and the level necessary to maintain the 1950 rate of civilian consumption and the current military requirements.

Total exports from the 5 countries amounted to 740 million pounds compared to 851 million pounds for the comparable months the previous season. The United States took about 21 percent of the quantity in 1950-51 and about 20 percent in the 1949-50 season. In comparison the United States took about 23 percent of the appreciably larger exports for the 3 seasons starting with 1946.

Uruguay and the Union of South Africa exported larger amounts than in the previous season through December but the decrease in the other countries were more than enough to offset the increases. Conditions in both Uruguay and South Africa were abnormal in the opening months of the 1949-50 season and increases in the current season represent more of a return to normal than larger export availability. The movement of this year's clip has had no major

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For information on wool production by countries, see FW 6-50, Foreign Agriculture Circular, "World Wool Production in 1950," November 27, 1950.

Seasons begin July 1 in Australia, New Zealand, and the Union of South Africa, and October 1 in Argentina and Uruguay.

WOOL: Exports from Southern Hemisphere countries, 1950-51 season through December 1/, with comparison
(actual weight)

Principal countries of destination	Australia		New Zealand 2/		Union of South Africa		Argentina		Uruguay	
	1949-50	1950-51	1949-50	1950-51	1949-50	1950-51	1949-50	1950-51	1949-50	1950-51
	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.
United States	57.9	49.3	6.0	15.9	17.6	14.0	66.8	28.7	18.6	50.0
United Kingdom	203.1	156.3	61.4	28.4	28.0	30.2	0.6	1.9	0.0	0.6
Canada	3.9	2.6	2.9	2.4	0.5	0.5	3/	0	0.0	3/
Continental Europe	86.4									
France	63.5	74.1	5.6	4.3	9.6	17.8	9.2	3.3	1.1	1.8
Belgium	28.4	59.6	1.6	1.5	10.1	12.4	1.8	1.2	2.1	5.4
Germany	23.1	25.3	3.3	2.0	11.8	13.5	1.0	1.7	2.4	0.6
Italy	35.8	29.0	0.8	1.6	4.1	11.0	1.8	1.6	1.6	0.8
Others		25.7	4.1	2.3	3.4	3.8	5.5	7.1	1.7	3.7
Total	237.2	213.7	15.4	11.7	39.0	58.5	19.3	14.9	8.9	12.3
Others	47.3	36.9	8.1	4.6	5.1	2.3	1.0	3.9	1.4	1.7
Total	549.4	458.8	93.8	63.0	90.2	105.5	87.7	49.4	28.9	64.6

1/ Season begins July 1 in Australia, New Zealand, and Union of South Africa and October 1 in Argentina and Uruguay. 2/ July - November. 3/ Less than 50,000 pounds.

Office of Foreign Agricultural Relations

Compiled from official sources and reports of Foreign Service officers.

impediments such as the dock strike in Uruguay last year, and the market has been conducive to early marketing. Actual quantities exported reflect the absence of stocks of old wool in the producing countries and possibly some speculative holding.

Exports to the United Kingdom for the period are down about 35 percent from last year and are down about 10 percent to France. Exports to Belgium and Germany remained about the same and wool consigned to Italy increased from 32 to 45 million pounds.

The wool considered above is mostly apparel wool and accounts for about 80 percent of the world's production and about 90 percent of that entering international trade. The consuming countries discussed received about 94 percent of the clip exported through December, leaving only 6 percent for the rest of the world.

The marketing season 1949-50 marked the end of large surpluses in the primary producing countries. Exports from Australia at 1,211 million pounds were up to the peak year of 1946 and considerably above the prewar average and other postwar years. Movement from New Zealand was down slightly from the 1947 and 1948 seasons but still up about two-thirds over the prewar average.

Exports from South Africa were down from the previous year and from the prewar average, while movements from the South American countries were up over both the previous year and prewar.

Almost complete clearance was effected by the end of last season in all of the 5 major countries and exports this year will come almost completely from new-clip wool. Production in the 1950-51 season is above prewar averages in all countries except the Union of South Africa; however, increased domestic consumption will hold some of the increase out of export channels. The rate of movement so far this season indicates a considerable drop from last year's totals for the season. The percentage destined for the United States however will be above last year and greatly over the prewar average.

United States Imports

United States imports of dutiable wools are presented on a calendar year basis but are not comparable to export data shown in the preceding tables. The relative importance of the various grades and the ranking of the 5 principal supplying countries of the Southern Hemisphere that supplement the indigenous production of the United States are shown.

The most striking changes over the past year were the importance of New Zealand as a supplier of medium wools and the large increase in the amount of fine wool from Uruguay.

Total United States imports of dutiable wools of nearly 400 million pounds in 1950 compared to only 28 million pounds 12 years ago indicate the importance of that country as a market for Southern Hemisphere wool.

WOOL: Exports from principal Southern Hemisphere countries, wool year basis, average 1934-38, annual 1947-49

(Actual weight)

Country of destination	Australia				New Zealand				Union of South Africa				Argentina				Uruguay			
	1934-38	1947	1948	1949	1934-38	1947	1948	1949	1934-38	1947	1948	1949	1934-38	1947	1948	1949	1934-38	1947	1948	1949
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
United States	26	124	75	130	15	20	24	51	2	31	16	24	53	302	103	237	15	100	67	121
United Kingdom	321	349	410	448	164	243	205	210	44	60	63	58	85	11	4	2	20	2	--------	0
Canada	3	16	14	16	10	12	16	11	--------	1	1	1	--------	--------	--------	--------	0	0	--------	--------
Continental Europe																				
France	110	173	221	155	25	65	79	38	50	50	54	23	48	75	20	53	7	0	1	11
Belgium	116	119	102	131	13	11	12	12	21	33	24	21	20	26	9	10	10	12	10	12
Germany	37	19	18	59	7	17	24	31	64	20	21	24	49	0	5	8	31	3	13	8
Italy	22	43	115	73	1	4	8	8	16	11	25	9	19	2	10	20	13	13	15	7
Netherlands	13	10	11	15	--------	16	15	15	1	8	4	5	2	9	7	5	4	10	9	3
Swadan	4	9	11	9	0	3	2	1	1	2	2	1	1	1	2	4	2	1	2	5
Polnnd	13	5	29	37	--------	1	6	4	3	2	2	1	10	2	2	1	2	4	1	--------
Others	26	6	9	17	1	3	3	2	1	5	3	2	6	31	8	19	3	6	3	3
Total Continental Europe	341	387	516	496	47	120	148	111	157	131	135	88	155	146	63	120	72	49	54	51
Japan	132	2	23	56	18	0	4	4	21	5	3	3	7	0	0	1	8	1		5
Other Near and Far East	2	5	2	--------	2	2	2	--------	0	0	0	0	--------	0	0	0	--------	--------	--------	--------
Australia	0	0	0	0	11	10	6	6	0	--------	--------	0	--------	0	0	0	0	0	--------	--------
Union of Soviet Socialist Republics	0	12	47	37	0	19	20	10	0	0	--------	0	0	0	2	0	0	1	2	0
All others	2	26	34	28	9	2	3	8	7	3	2	5	6	13	6	6	0	2	2	2
Total	827	921	1,121	1,211	274	428	428	411	231	231	220	179	306	472	178	366	115	155	125	179

Season beginning July 1 in Australia, New Zealand, and Union of South Africa, and October 1 in Argentina and Uruguay. Dash (--------) indicates negligible amount included with "Others."

Compiled from official sources and reports of Foreign Service Officers.

DUTIABLE WOOL: United States imports for consumption by principal countries, 1937-50 1/
wool not finer than 40's, 40's-44's, 44's-56's and over 56's
(actual weight)

Country	1937	1938	1939	1940	1941	1942	1943	1944	1945	1946	2/ 1947	2/ 1948	2/ 1949	2/ 1950
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
					Wool not finer than 40's (except Donskoi, Smyrna, etc.)									
Australia	516	90	253	114	105	45	58	4	88	232	84	246	847	1,552
New Zealand	4,226	1,720	3,278	348	260	576	331	576	1,456	1,815	742	325	315	1,419
Union of South Africa	18	5	0	19	154	17	4	0	14	0	1	54	191	817
Uruguay	1,690	735	550	1,142	2,249	1,206	327	735	737	667	481	549	307	568
Argentina	10,189	5,802	11,163	15,133	31,186	29,371	12,720	36,947	34,660	65,026	35,707	22,827	11,408	15,199
Other countries	2,545	1,645	2,123	1,096	1,388	820	514	508	1,389	709	321	575	295	840
Total	19,184	9,997	17,367	17,852	35,342	32,035	13,954	38,770	38,344	68,449	37,336	24,576	13,363	20,396
							40's to 44's							
Australia	316	14	31	30	23	100	27	36	168	191	1,216	99	707	1,547
New Zealand	3,927	1,649	2,896	1,311	970	2,690	3,436	5,022	8,180	11,025	7,317	3,115	3,551	9,033
Union of South Africa	0	0	0	0	40	4	0	0	0	0	0	0	1	7
Uruguay	2,650	196	2,382	2,105	6,078	2,389	2,658	2,975	3,009	3,774	2,029	2,622	1,531	2,007
Argentina	2,230	295	917	2,260	5,313	9,160	23,815	21,681	11,914	17,500	7,844	6,139	3,332	2,479
Other countries	1,319	445	810	631	645	605	407	421	613	511	1,276	2,648	364	1,155
Total	10,442	2,599	7,036	6,338	13,069	14,948	30,343	30,135	23,884	33,001	19,682	14,613	9,486	16,228
							44's to 56's							
Australia	3,875	384	2,578	3,213	2,524	6,149	6,136	3,551	9,672	12,963	9,291	4,301	4,279	10,051
New Zealand	6,596	1,560	3,624	3,557	3,382	14,237	15,306	12,168	32,298	35,056	15,730	11,137	7,394	13,922
Union of South Africa	310	30	25	224	1,892	1,856	878	97	491	726	195	54	60	51
Uruguay	11,196	1,385	6,335	17,836	36,188	11,848	39,378	44,555	60,040	29,349	9,452	14,366	4,661	11,039
Argentina	4,062	1,013	2,524	12,526	46,220	42,620	48,710	30,992	38,958	40,148	14,167	18,875	7,329	10,217
Other countries	5,658	2,334	4,213	7,849	9,687	8,179	17,622	41,077	19,351	12,247	5,531	6,488	4,271	6,575
Total	31,697	6,706	19,299	44,206	99,893	84,889	128,030	132,440	160,810	130,489	54,366	55,221	27,994	51,855
							Over 56's							
Australia	64,835	6,113	26,500	36,115	235,000	496,349	290,918	206,692	277,945	336,235	204,060	138,701	93,046	124,480
New Zealand	763	121	180	106	683	7,354	4,375	2,667	7,525	6,355	5,599	2,841	2,068	3,410
Union of South Africa	4,087	495	8,303	31,008	41,579	75,345	42,557	23,839	37,979	116,339	42,035	31,960	27,293	20,766
Uruguay	6,024	459	7,345	23,203	59,171	13,945	57,618	54,060	79,235	58,334	50,488	84,555	60,912	105,641
Argentina	7,405	1,798	4,638	50,687	100,515	46,185	57,729	37,242	29,184	39,634	17,760	48,465	15,647	43,977
Other countries	1,348	154	1,311	7,487	12,100	5,720	13,107	13,760	14,893	11,953	5,384	14,239	11,528	12,146
Total	84,462	9,140	48,277	148,605	449,048	644,898	466,304	338,260	446,761	572,850	325,326	320,761	210,494	310,420
Total dutiable	145,785	28,440	91,979	217,001	597,352	776,770	638,631	539,605	669,799	804,789	436,710	415,180	261,337	398,899

1/ Excludes courtesy wool. 2/ Preliminary.

Source: Bureau of Census, Department of Commerce.

Compiled in Livestock and Wool Division, OFAR, March 1951.

FOREIGN AGRICULTURE CIRCULAR

OFFICE OF FOREIGN AGRICULTURAL RELATIONS
UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FW 2-51

June 18, 1951

WORLD WOOL PRODUCTION IN 1951

World wool production in 1951 is estimated at 4.1 billion pounds grease basis, an increase of 120 million pounds over the revised 1950 total according to the semi-annual wool report of the Office of Foreign Agricultural Relations. World production fell to 3.7 billion pounds in 1947 but since has increased about 12 percent. The estimate for the current year is about 210 million pounds or about 6 percent above the 1936-40 average and only 60 million pounds below the 1941 output of 4.2 billion which was an all-time high. This estimate includes both apparel and carpet wool and on a grease basis.

Late information, quoting an authoritive source in Australia places wool production in that country at 1120 million pounds. This is 5 percent or about 60 million pounds below the 1950-51 output and 80 million pounds under the figure included in the world tabulation on the following pages. The significant reduction is attributed to a drop in sheep numbers, as well as to some decline in yield per animal. Sheep drowning, pests, diseases, decreased lambing, and emergency shearing in the States of Queensland and New South Wales during the last several months contributed to the drop in the figure as well as the unforeseeable feed and pasture situation over a part of Australia as winter approaches.

Based upon estimates of the spring clip in the Northern Hemisphere combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. World wool production is summarized twice each year. The next summary will be in November at which time the outturn of the clip will be revised.

WOOL: Production in specified countries, greasy basis, averages 1936-40 and 1941-45; annual 1947 to 1951 1/

Continent and country	Averages 1936-40	Averages 1941-45	1947	1948	1949	1950 2/	1951 2/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
NORTH AMERICA							
Canada	15.6	17.7	14.1	11.9	9.8	9.6	10.0
United States							
Shorn	360.6	360.2	252.8	233.9	216.8	220.1	227.6
Pulled	64.7	68.3	56.6	46.6	35.6	32.4	32.4
Total	425.3	428.5	309.4	280.5	252.4	252.5	260.0
Estimated total 3/	451.7	457.3	334.7	304.6	271.9	270.9	279.7
EUROPE							
Austria	2.1	2.7	2.6	3.1	3.6	3.0	3.5
Bulgaria	28.7 4/	26.4 4/	26.4 4/	27.0 4/	27.0 4/	27.0 4/	28.0
Eire	17.2	15.9	13.3	12.2	12.0	13.7	14.0
Finland	2.7	1.9	2.4	2.4	2.4	2.5	2.6
France 5/	37.1	27.3	28.6	29.3	33.9	35.0	33.0
Germany 6/	31.7	35.5	25.4	26.8	29.0	27.0	27.0
Greece	19.3	12.8	19.1	18.2	17.1	16.5	17.2
Hungary	12.9	8.9	4.4	5.4	5.9	6.8	-
Italy	30.4	27.5	27.1	28.9	35.3	35.0	37.0
Netherlands	6.2	4.9	4.6	4.6	6.2	6.5	6.5
Norway	5.9	5.9	6.2	6.4	7.0	7.0	7.0
Poland and Danzig 6/	6.8	-	-	-	-	-	-
Portugal	16.3	17.2	18.0	18.0	17.0	21.2	22.0
Rumania 6/	40.7	-	-	-	-	-	-
Spain	70.0	83.0	77.0	88.0	82.0	100.0	100.0
United Kingdom	110.1	88.6	71.8	75.0	82.5	86.0	85.0
Yugoslavia	34.7	-	-	-	-	-	-
Estimated total (excl. U.S.S.R.) 7/	483.4	446.0	398.2	424.0	443.6	473.3	478.3
U.S.S.R. (Europe and Asia) 6/9/	310.2 7/	279.7	285.8	304.6	314.9	325.0	335.0

ASIA							
Iran	36.3	29.6	30.0	29.8	24.7	35.3	37.0
Iraq	21.6	21.1	24.2	32.7	26.7	28.7	30.0
Syria	10/ 10.7	11.0	12.7	12.1	10.0	13.0	15.0
Turkey	67.7	67.9	71.2	75.5	70.9	67.2	75.0
Afghanistan	15.0	15.0	15.0	17.0	17.2	18.0	18.0
China 11/	88.0	81.0	75.0	75.0	75.0	75.0	75.0
India	12/ 72.9	12/ 79.0	54.5	53.0	46.2	50.5	52.0
Pakistan	-	-	26.0	26.0	30.0	35.0	40.0
Estimated total (excl. U.S.S.R.) 13/	344.2	336.7	341.8	354.7	347.2	369.5	388.9
SOUTH AMERICA							
Argentina 14/	411.0	505.8	475.0	419.0	420.0	420.0	440.0
Brazil 15/	35.5	37.6	43.0	45.2	48.5	47.4	49.6
Chile	32.6	38.6	41.9	41.9	46.3	44.0	46.0
Falkland Islands	4.0	4.2	4.0	4.0	3.2	4.7	4.8
Peru	19.4	17.6	15.9	17.2	18.7	19.8	20.5
Uruguay	126.2	144.0	150.3	144.0	163.3	176.4	190.0
Estimated total 16/	638.9	759.5	743.6	684.8	713.5	724.9	763.5
AFRICA							
Algeria	22.6	22.6	13.8	13.2	14.0	17.0	19.0
Egypt	7.5	5.9	5.6	7.7	6.4	8.0	6.6
French Morocco	35.1	39.4	25.0	28.0	30.0	33.1	35.3
Libya	-	3.2	3.4	1.0	1.7	1.6	
Tunisia	12.0	12.9	11.0	7.9	8.0	11.0	12.0
Union of South Africa 17/	252.3	234.0	205.2	219.0	217.5	230.0	240.0
Estimated total 18/	336.8	321.9	267.8	280.6	281.4	304.5	318.4
OCEANIA							
Australia	1,051.9	1,088.0	973.0	1,031.0	1,155.0	1,177.0	1,200.0
New Zealand	313.8	350.4	362.0	367.0	390.0	372.0	380.0
Total	1,365.9	1,438.5	1,335.1	1,398.1	1,545.1	1,549.1	1,580.1
Estimated world total 19/	3,930.0	4,040.0	3,710.0	3,750.0	3,920.0	4,020.0	4,140.0

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Mexico, Newfoundland, Netherlands West Indies, Guatemala and El Salvador. 4/ Includes Southern Dobrudja beginning 1944. 5/ Data for years 1945 and 1946 not comparable with prewar and 1947. 6/ Based on present boundaries. 7/ Two years average (1944 and 1945). 8/ Includes estimates for Albania and for countries producing 2 million pounds or less, namely Belgium Czechoslovakia, Denmark, Iceland, Sweden and Switzerland. 9/ Based on the number of sheep and an average fleece weight of 4.7 pounds per head. 10/ Includes Lebanon. 11/ Includes China proper (22 provinces), Manchuria, Jehol and Sinkiang (Turkestan). Figures for postwar years of 75 million pounds used only to indicate approximate level. 12/ Includes Pakistan. 13/ Includes estimates for Cyprus, Palestine and Transjordan, Outer Mongolia, Tibet and Nepal. 14/ Based on estimates of the Buenos Aires Branch, First National Bank of Boston through 1947. 15/ Estimates based largely on production in Rio Grande do Sul, which produces about 80 percent of the total. 16/ Includes relatively small production in Bolivia, Colombia, Ecuador, Paraguay and Venezuela. 17/ Union of South Africa, Union Protectorates and South West Africa. 18/ Includes estimates for Kenya, French West Africa and Togo. 19/ Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates for countries having changed boundaries have been adjusted to present boundaries except as noted. June 18, 1951.

Favorable weather conditions since 1948 over most of the world where sheep are grown have since allowed a steady increase in sheep numbers. At present, numbers are about 4 percent above last year.

The trend in wool prices, which has been upward since 1946, turned up at an even faster rate in the past 10 months, and has given added impetus to the expansion of wool production.

Under the favorable conditions mentioned above production in all major wool-producing areas of the world is above prewar and war-year averages, with the exception of North America. Returns from sheep and wool on this Continent in relation to other farm enterprises were unfavorable during the postwar years until recently, but at present are becoming more favorable.

WOOL: Estimated world production, greasy basis, by continent, averages 1936-40, 1941-45, annual 1947-1951

Continent	Averages 1936-40	Averages 1941-45	1947	1948	1949	1950	1951
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
North America	452	457	335	305	272	271	280
Europe	483	446	398	424	444	473	478
U.S.S.R.	310	280	286	305	315	325	335
Asia	344	337	342	355	347	369	389
South America	639	760	744	685	713	725	764
Africa	336	322	268	281	281	305	316
Oceania	1,366	1,438	1,335	1,398	1,545	1,549	1,580
Total 1/	3,930	4,040	3,710	3,750	3,920	4,020	4,140

1/ Rounded to tens of millions. Office of Foreign Agricultural Relations, June, 1951.

Northern Hemisphere

Production in the Northern Hemisphere for the current season is about 1.5 percent above 1950 in contrast to the downward trend from 1941 through 1949. Output is, however, still below the 1936-40 and 1941-45 average. In the early war years decreases occurred in Europe but production is now practically back to prewar in that area. In the postwar years through the present the United States has been chiefly responsible for the decline in wool output above the equator. This decline has now been halted and some upturn is expected by the spring of 1952.

The Northern Hemisphere now produces about 150 million pounds less wool than in 1936-40. As all the important wool consuming countries--the United States, Canada, the United Kingdom, France, Germany, Italy, Belgium, the

Soviet Union and Japan--are located in the Northern Hemisphere, this further dependence upon Southern Hemisphere supplies has intensified the problems of distribution.

North America

The downward trend in wool production in North America which began in 1943 was finally arrested in 1950 and preliminary estimates show an actual increase in the two leading producing countries, the United States and Canada for 1951. Factors affecting agricultural production and choice of enterprise are similar in both countries. The increasingly favorable outlook for sheep and wool has lessened the relative advantage of other types of farm enterprise over sheep, which has prevailed over the last several years. Practically all the wool produced in North America is apparel type and is consumed largely by domestic mills.

Europe

In Europe, wool production for the current year shows some increases over a year earlier, continuing the gradual return to prewar levels. In the United Kingdom the slightly higher fixed prices for wool has tended to build up sheep numbers and wool production where possible. This tendency, however, has been partially offset by winter conditions much worse than 1947 in the hills of Wales and Scotland.

On the Continent weather conditions have been more favorable and under the prevailing price situation production has been maintained or increased in all countries with the exception of France where a slight decrease is noted.

Europe is a deficit area producing only about 20-30 percent of its needs and is the chief market for Southern Hemisphere surpluses. The countries of Western and Northern Europe produce mainly fine and medium apparel wool, whereas southeastern European countries produce a coarser quality. For the whole area about 70 percent of the output is of the apparel types.

Sheep numbers and wool production are reported to be on the increase in U.S.S.R. Production is now above prewar and efforts are being made to improve the quality and yield through breeding programs.

The wool produced in Asia is predominately carpet or coarse wool. Little is known of the current wool situation in China and some of the other areas of the Far East, however, supplies of carpet wool are still getting into international trade to some extent. Production of wool does not vary appreciably from year to year, however, the high prices during the past few months have brought out larger quantities than usual from Tibet and some of the other areas around India and China. India's production remains rather stationary. Normally about 75 percent of the clip is called "white" wool and 5 percent yellow, the remainder consisting of light grey and black, grey and fawn.

In the Near East better than normal weather has allowed an increase in wool output. Increased value of wool has created a new interest in the care and preparation for market of the clip as well as better care of the animals. These practices have increased the yield and value. Much wool that normally would not come to market has appeared also as a result of the good pieces.

North African production increased somewhat in the current season as a result of favorable weather conditions. The sheep industry in this area is similar to that in the Near and Middle East with a large part of the sheep owners belonging to nomadic tribes. Hand feeding and other improved practices of sheep husbandry are not followed to any great extent and output is influenced greatly by weather conditions. Most of the wool produced is medium and coarse wools.

Southern Hemisphere

The Southern Hemisphere now produces about five-eighths of the total world's supply of wool and is more important than ever before in international trade. The forecast of output for the new season beginning July 1 is about 310 million pounds above the 1936-40 average and about 140 million pounds greater than war time. Over 90 percent of the total Southern Hemisphere output is apparel wool and production in Australia and South Africa particularly is made up chiefly of very fine merino wools. Most of the so called carpet wool of the area is produced in Argentina. New Zealand produced chiefly medium crossbred wool and Uruguay's output is predominately fine crossbred.

British Dominions

The weather and feed situation has been favorable in Australia since 1947 when drought caused severe losses in sheep and wool production. Sheep numbers as of March 31, 1950 has reached a level in excess of the 1936-40 average and early forecasts of the 1951 numbers indicated an increase of about 4 percent. Later information, which reassesses the damage of flood and wet weather conditions in Queensland and New South Wales and takes cognizance of the poor feed outlook for the winter and the current pasture situation over large areas of Australia, discounts the forecast made earlier and places wool production for the season beginning July 1 at 1120 million pounds. As noted before this is about 60 million pounds below the 1950-51 output and 80 million pounds under the figure included in the world tabulation in the preceding tables.

Notwithstanding this setback, Australia still supplies the bulk of the fine wool requirements. The strong world demand for fine wool will encourage production, however, and weather permitting losses will be recouped and further increases are possible.

Sheep numbers in 1950 in the Union of South Africa made gains over 1949. Conditions remain favorable and further increases in wooled sheep may be expected in 1951, reversing the trend toward Karakul which had been in evidence in the past few years. The immediate prospect for the 1951-52 wool production

is that the clip may reach 240 million pounds, this forecast is of course dependent upon relatively normal weather. Almost all of South African production consist of fine merino wools.

Production in New Zealand is expected to be back up to 380 million pounds after a slight drop in the past season. Fluctuations are not normally very wide, the reduced output in 1950-51 resulting from pre-lambing shearing in the previous year. The effects of the curtailment of the current marketing season and the backing up of wool supplies on farms because of the strike of dock workers is not known at this time. Plans to open the auctions in August to dispose of this holdover before normal seasonal operations will presumably remove this supply from the picture.

South America

Heavy late snow and consequent sheep mortality in Patagonia have made it necessary to revise the 1950-51 Argentine wool clip down to 420 million pounds. Reduction in sheep slaughter which made less pulled wool available also contributed to the revision. Large wool profits of the past two seasons and outlook for continued favorable price have encouraged expansion of sheep holdings. Increases are evident throughout the country and slaughtering operations have been reduced drastically. Under these conditions the forecast of 440 million pounds is considered attainable.

In Uruguay sheep are still expanding even at the expense of beef cattle. Overstocking is quite prevalent and sheep are kept on beyond normal age in order to increase wool production. The past marketing season has been exceptionally active and indications are that wool output will be increased substantially in the coming season.

The outlook is excellent over a greater part of the major producing countries of the Southern Hemisphere. High prices for wool in the season now ending has created a policy of expansion in sheep numbers and near-record numbers are being carried into the winter. Feed and pasture conditions are favorable as winter approaches and if no major droughts, freezes or diseases occur in the ensuing months the relatively optimistic production forecasts should hold up.

FOREIGN AGRICULTURE CIRCULAR

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UNITED STATES DEPARTMENT OF AGRICULTURE
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FW 3-51

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MOVEMENT OF WOOL FROM SOUTHERN HEMISPHERE

Movement of the 1950-51 wool clip of the major producing countries of the Southern Hemisphere has been at a lower rate than in the previous season. Total exports for the season through March 31, 1951 were 1,371 million pounds compared to exports of 1,588 million pounds for the same period last year and 1,377 million pounds through March of the 1948-49 season, according to preliminary data available to the Office of Foreign Agricultural Relations.

Exports from Australia, New Zealand, and Argentina for the period were below exports of the previous season. Carry-in stocks were lower than in former years in all these countries and exports were made up largely of new-clip wool. Sales for the period in Australia were about 200,000 bales below sales in the previous year and wool shipped abroad for sale amounted to only 17,000 bales, about half of the figure for last season through March.

The strike of dock workers in New Zealand in the early part of 1951 seriously curtailed shipments and sales of wool in that country. In Argentine a reduction in exportable supplies for the season as a result of smaller carry-in and restrictions on exports through failure of the government to grant export licenses at the lower prices prevailing since mid-March have contributed to the smaller export figure.

Movement from Uruguay and the Union of South Africa in the 1950-51 season through March was considerably above that in the previous year. In both countries production has increased and unsold stocks carried into the season were a little larger than in the previous year making more available for export during the current season. Exports from Uruguay were held back in this period of the 1949-50 season because of the strike of wool handlers at the port. In both countries sales and exports have progressed rapidly this year, with no impediments, leaving very little wool on hand for export for the remainder of the season.

Season begins July 1, in Australia, New Zealand, and the Union of South Africa, and October 1 in Argentina and Uruguay. For information on wool production, by countries see FW-2-51, "World Wool Production in 1951." "World Trade in Raw Wool" is available in FW-4-51 and current seasonal wool movement data are included in the weekly "Foreign Crops and Markets", all available from the Office of Foreign Agricultural Relations, U.S. Department of Agriculture, Washington 25, D.C.

The distribution of the Southern Hemisphere clip among the chief consuming countries for the period showed considerable change from the previous season. The United States and Italy were the only countries receiving more wool this season than in 1949-50. Exports to the United States were up only about 3 million pounds, however purchases have been greater in the later months of the season. Exports to Italy were on low level in the 1949-50 and movement this season marks a return to more normal expectation.

The United Kingdom had the greatest actual and percentage decrease from the previous year, with Canada and Germany following a close second and third percentagewise. France, Belgium, and other European countries showed a decrease of around 14 percent. The reduced availability of wool and the consequent high prices that have prevailed during the season are reflected in these export data.

United States Imports

United States imports of apparel wool are presented on a calendar year basis, clean content, by grade category in order to show the significance of the major producing countries as a source of supply for this country.

All five major countries supplied more wool in 1950 than in 1949 with the exception of South Africa as total United States imports returned from the 1949 low to the approximate 1947 and 1948 levels. Imports in 1950 from Uruguay were considerably above the 1946-50 average, about the same for New Zealand, and less from Australia, South Africa, and Argentina, while total imports for the year were down 27 million pounds, clean, from the five year average.

Possibly the most important shift in 1950 in the finer grades, over 56's, was the increase in takings from Uruguay and the corresponding decrease from Australia and South Africa. However, Australia is still the chief source of U.S. imports of fine wool. In the other categories the relationships of supplying countries remained about the same.---By Eugene T. Ransom, based in part upon U.S. Foreign Service reports.

WOOL: Exports from Southern Hemisphere countries, 1950-51 season through March 1/ with comparison

(actual weight)

Principal countries of destination	Australia		New Zealand		Union of South Africa		Argentina		Uruguay	
	1949-50	1950-51	1949-50	1950-51	1949-50	1950-51	1949-50	1950-51	1949-50	1950-51
	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.
United States	101.4	109.4	27.0	26.2	22.3	32.1	149.8	71.5	38.8	103.3
United Kingdom	340.0	238.6	140.0	85.6	45.8	45.1	1.6	6.7	0	1.0
Canada	11.2	7.2	6.2	4.8	0.7	1.0	0.1	2/	0	0.1
Continental Europe										
France	119.3	103.3	21.3	19.0	20.1	25.9	27.5	15.8	2.0	5.0
Belgium	95.0	76.3	7.8	6.3	17.3	16.2	6.1	3.7	5.1	8.4
Germany	46.3	35.7	20.3	10.1	19.8	19.2	5.7	7.4	3.6	1.2
Italy	44.8	57.0	3.7	3.8	7.1	16.3	7.7	7.7	3.5	3.4
Others	53.7	37.3	16.0	19.4	6.9	3.5	15.5	16.2	3.4	6.6
Total	359.1	309.6	69.1	58.6	71.2	81.1	62.5	50.8	17.6	24.6
Others	97.5	90.9	14.9	6.2	7.5	5.3	2.0	8.0	1.1	3.2
Total	909.2	755.7	257.2	181.4	147.5	164.6	216.0	137.0	57.5	132.2

1/ Season begins July 1 in Australia, New Zealand, and Union of South Africa and October 1 in Argentina and Uruguay. 2/ Less than 50,000 pounds.

Office of Foreign Agricultural Relations

Compiled from official sources and reports of Foreign Service officers.

APPAREL WOOL: United States imports for consumption by principal countries, 1936-40 and 1941-45 average, annual 1946-50, 1947 through 1950 on 6 months basis 1/, wool not finer than 40's, 40 - 44's, 44's - 56's and over 56's

(clean content)

Country	Average			1947 2/			1948 2/			1949 2/			1950 2/		
	1936-40	1941-45	1946	January - June	July - December	January - December	January - June	July - December	January - December	January - June	July - December	January - December	January - June	July - December	January - December
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Australia	121	36	131	33	11	44	45	102	147	113	377	490	298	663	961
New Zealand	1,062	436	1,253	368	146	514	103	130	233	101	113	214	332	769	1,101
Uruguay	812	676	444	208	115	323	221	136	357	66	147	213	285	99	384
Argentina	8,345	19,857	42,999	13,212	9,994	23,206	10,097	4,925	15,022	2,811	4,805	7,616	6,584	3,621	10,205
Other countries	1,258	671	473	90	133	223	187	328	515	153	148	301	316	709	1,025
Total not finer than 40's	11,598	21,676	45,300	13,911	10,399	24,310	10,653	5,621	16,274	3,244	5,590	8,834	7,815	5,861	13,676
Australia	78	45	109	113	9	122	4	65	69	81	249	330	364	548	912
New Zealand	1,179	2,846	8,104	2,892	3,288	6,180	1,918	1,254	3,172	1,074	1,563	2,637	2,491	4,381	6,872
Uruguay	1,490	2,296	2,576	825	565	1,390	932	901	1,833	616	417	1,033	504	869	1,373
Argentina	1,172	10,099	12,223	3,694	2,563	6,257	3,127	2,014	5,141	1,108	1,142	2,250	1,027	612	1,639
Other countries	592	369	380	133	70	203	211	10	221	151	96	247	135	449	584
Total 40 - 44's	4,511	15,655	23,392	7,657	6,495	14,152	6,192	4,244	10,436	3,030	3,467	6,497	4,521	6,859	11,380
Australia	1,829	3,541	8,163	3,777	2,233	6,010	1,839	931	2,770	885	1,908	2,793	3,294	3,812	7,106
New Zealand	1,834	10,524	24,721	7,346	3,982	11,328	4,261	3,831	8,092	1,866	3,595	5,461	4,631	5,742	10,373
Uruguay	7,711	25,213	19,471	3,534	2,712	6,246	5,910	2,886	8,796	764	2,325	3,089	1,711	5,805	7,516
Argentina	4,396	31,398	27,223	4,893	4,474	9,367	8,299	3,983	12,282	1,995	2,696	4,691	3,801	2,984	6,785
Other countries	4,164	9,475	7,297	2,337	973	3,310	1,961	1,908	3,869	890	1,346	2,236	1,432	2,368	3,800
Total 44's - 56's	20,134	80,151	86,875	21,887	14,374	36,261	22,270	13,539	35,809	6,400	11,870	18,270	14,869	20,711	35,580
Australia	18,948	168,462	183,921	84,279	33,015	117,294	51,285	29,950	81,235	20,777	32,191	52,968	43,080	33,769	76,849
New Zealand	152	2,862	3,936	2,583	1,051	3,634	819	879	1,698	543	1,013	1,556	748	1,753	2,501
Union of South Africa	8,218	21,584	56,286	14,393	5,804	20,197	10,084	6,474	16,558	5,572	8,219	13,791	6,943	4,487	11,430
Uruguay	7,623	32,689	35,499	12,490	16,243	28,733	33,767	14,753	48,520	12,236	24,602	36,838	28,636	35,855	64,491
Argentina	12,240	32,835	25,100	5,086	5,010	10,096	17,908	9,317	27,225	4,672	4,537	9,209	13,637	11,569	25,206
Other countries	2,107	6,084	6,588	1,713	1,200	2,913	3,423	4,208	7,631	4,101	2,186	6,287	2,451	4,251	6,702
Total over 56's	49,288	264,516	311,330	120,544	62,323	182,867	117,286	65,581	182,867	47,901	72,748	120,649	95,495	91,684	187,179
Total apparel	85,531	381,998	466,897	163,999	93,591	257,590	156,401	88,985	245,386	60,575	93,675	154,250	122,700	125,115	247,815

1/ Excludes courtesy wool. 2/ Preliminary.

Source: Bureau of the Census Department of Commerce.

Compiled in Livestock and Wool Division, OFAR, June 1951.

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WORLD TRADE IN RAW WOOL IN 1949 AND 1950

World trade in raw wool, in 1950, estimated at approximately 2.6 billion pounds, actual weight, was up about 200 million pounds over 1949 and about 300 million pounds over the 1935-39 average, according to information available to the Office of Foreign Agricultural Relations. The volume of trade in 1950 was greater than in any recent year with the exception of 1946 when a total of over 2.8 billion pounds changed hands as manufacturers rushed to fill the back-log of consumer demand and to rebuild mill stocks which were depleted during World War II.

The larger trade in 1950 was made possible by the continued heavy demand for wool in most consuming countries but is chiefly a result of the increased imports of the United States, which were up nearly 250 million pounds over 1949.

RAW WOOL: International Trade, Average 1935-39, Annual 1948 to 1950.
(actual weight)

Continent	Average 1935-39		1948 1/		1949 1/		1950 1/	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.	Mil. lbs.
North America	7	246	6	807	22	480	10	720
Europe	216	1,801	105	1,662	114	1,835	160	1,768
U.S.S.R.	2/	68	2/	3/ 60	2/	3/ 55	2/	3/ 50
Asia	124	203	10	45	63	62	132	90
South America	454	5	575	8	338	9	571	8
Africa	259	0	222	10	206	6	214	2
Oceania	1,095	0	1,470	0	1,574	0	1,509	0
TOTAL	2,155	2,323	2,393	2,592	2,317	2,447	2,596	2,638

1/ Preliminary. 2/ Not available. 3/ Based on exports from primary sources.

For information on world wool production, by countries, see Foreign Agriculture Circular FW-2-51. For seasonal movement data through March, see FW-3-51, both available from the Office of Foreign Agricultural Relations, U.S. Department of Agriculture, Washington 25, D. C.

Office of Foreign Agricultural Relations, July 1951.

On the supply side, in addition to current clip, some Joint Organization stocks were still available throughout 1950 plus some of the South American clip that remained unsold at the end of the 1948-49 marketing season.

Trade in wool was brisk throughout 1950. The first 6 months, which coincides with the final half of the Southern Hemisphere marketing season, saw almost complete clearance of the 1949-50 clip at steadily increasing prices. The second half saw a much higher level of prices but wool still moved at a fairly rapid rate.

Present indications are that International Trade in Wool in 1951 will be below 1950 and probably down to the 1949 level. The quantity traded will consist mainly of wool produced in the period, as practically all Joint Organization Wool had been sold by 1951 and most of the stocks outstanding in producing countries were moved out in the previous year.

Trade in the first 6 months of 1951 has been less than expected, due to the dock workers strike in New Zealand and fairly large holding in some of the other producing countries, particularly Argentina. These stocks, which were not moved due to the rapid falling off in prices in the second quarter, are expected to be cleared within the next 6 months along with the new clip regularly sold in this period.

Trade in wool for the most part is confined to the 5 major producing countries of the Southern Hemisphere and to the United States, the United Kingdom and continental Europe. In 1950 these areas imported about 95 percent of total world imports.

Imports into the United States and Canada for 1950 increased by about two-thirds over 1949. Most of the increase was in shipments to the United States, whose imports were relatively low in 1949. Canadian imports were more stable. Imports into both countries are much greater than prewar as a result of increased mill consumption and a lower domestic production of wool.

European imports tapered off slightly in 1950 from the 1949 level. Most of the decrease was accounted for by the United Kingdom; however, only Belgium and Germany showed any appreciable increase over the previous year. Exports from the primary supplies indicate a slight decrease in movement to the Soviet Union in 1950.

Exports from all the commonwealth wool producing countries, Australia, New Zealand and South Africa, were down slightly in 1950 from the previous year as current movement becomes more dependent upon new clip wools. High prices have stimulated the movement of more coarse or carpet wool into world trade from countries of the Near East and North Africa. The large increase in 1950 over 1949 however, originated in Argentina and Uruguay where as noted before larger than normal carry-over was available for export.

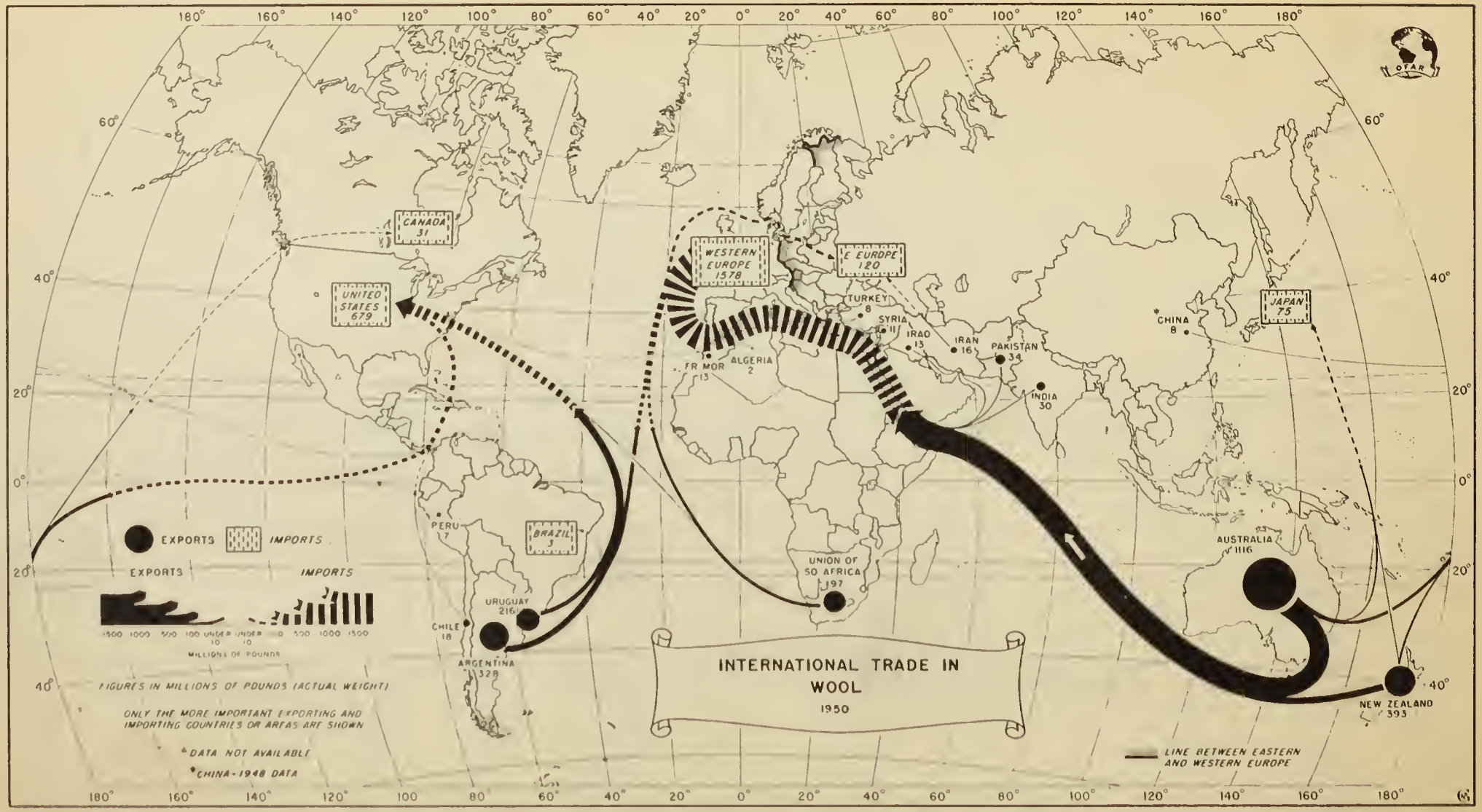
WOOL: International trade, average 1935-39, annual 1947-1950

Continent and country	Average 1935-39		1947 1/		1948 1/		1949 1/		1950 1/	
	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports	Exports	Imports
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
NORTH AMERICA										
Canada	6,241	19,337	3,131	39,339	3,070	42,399	3,033	31,986	3,369	34,222
Mexico	2/	2,041	2/	9,140	1,894	3,267	3,540	7,197	3/	3/
United States	325	224,498	12,720	644,000	1,072	761,406	15,632	440,924	6,684	685,556
Total	6,566	245,876	15,851	692,479	6,036	807,072	22,210	480,107	10,053	719,778
EUROPE										
Austria	183	4/5/ 20,900	162	9,072	39	8,843	762	17,596	1,500	19,000
Belgium	98,316	226,345	69,548	260,286	51,039	164,708	34,332	187,649	46,418	220,685
Bulgaria	4	1,693	3/	3/	3/	3/	3/	3/	3/	3/
Czechoslovakia	4/5/ 1,050	4/5/ 36,387	21	46,541	0	38,593	3/	3/	3/	3/
Denmark	353	4,149	390	12,812	0	9,072	15	11,232	346	9,569
Eire	14,250	691	8,749	5,280	9,549	7,795	10,668	4,507	13,052	4,230
Finland	0	5,772	0	7,104	0	8,168	0	10,30	3/	3/
France	59,575	403,345	6,682	424,400	15,185	486,968	29,290	482,930	38,678	453,040
Germany	0	259,932	6/3/	6/3/	0	90,946	101	138,910	1,043	182,623
Greece	1,706	7,717	11	4,251	371	5,152	270	9,685	682	14,426
Hungary	339	2,126	0	7,765	3/	3/	3/	3/	3/	3/
Iceland	1,512	0	1,240	0	747	0	574	0	558	0
Italy	1,040	78,958	1,703	293,786	2,664	128,503	2,365	158,818	3,086	141,974
Netherlands	3,908	16,318	1,014	56,059	1,287	35,395	1,678	41,452	1,492	38,962
Norway	272	2,161	9	8,863	1	7,672	4	9,037	0	4,017
Poland and Danzig	4/ 80	4/ 46,045	0	40,646	0	48,300	3/	3/	3/	3/
Portugal	2,188	3,377	815	13,730	1,279	4,486	1,748	2,501	6,422	1,172
Rumania	600	1,334	3/	3/	3/	3/	3/	3/	3/	3/
Spain	7/ 2,195	12,236	44	5,575	0	11,646	0	3,366	1,693	5,202
Sweden	427	16,885	1,400	31,977	446	26,276	302	27,217	0	22,705
Switzerland	271	17,234	501	30,392	303	20,767	270	16,604	380	21,330
United Kingdom	26,072	628,893	25,701	499,643	21,836	556,883	31,435	713,178	44,515	628,550
Yugoslavia	1,143	8,179	3/	3/	3/	3/	3/	3/	3/	3/
Total	215,984	1,800,677	117,990	1,763,182	104,746	1,662,173	113,814	1,835,218	159,865	1,767,485
U.S.S.R. (Europe and Asia) 8/	-	67,600	3/ 9/	29,509	3/ 9/	59,621	3/ 9/	55,000	3/	50,000

ASIA										
Cyprus	1,226	0	11	0	34	0	28	0	3/	3/
Iran	12,890	0	5,671	1,086	992	2/	2,291	0	16,466	0
Iraq	13,651	0	6,160	0	15,954	0	9,008	0	12,896	0
Lebanon	10/	10/	10/	10/	8,762	0	3/	3/	4,372	3,770
Israel	-	-	505	980	-	-	-	-	-	-
Syria	4/ 5,787	386	8,031	0	6,612	0	3/	3/	15,920	4,852
Turkey	17,639	1,182	1,739	11,905	1,059	8,658	397	9,337	13,451	5,697
China	23,608	0	3,507	0	8,476	0	3/	3/	3/	3/
India	49,016	12,900	25,951	11,789	30,500	14,537	27,363	11,784	30,000	3/
Japan	0	188,257	0	2,778	0	22,266	0	41,035	0	75,422
Pakistan	11/	11/	11/	11/	25,227	0	23,714	0	33,687	0
Total	123,817	202,725	51,575	28,538	101,101	45,461	62,791	62,156	131,678	89,741
SOUTH AMERICA										
Argentina	305,725	80	376,394	0	418,202	0	211,262	0	327,976	0
Bolivia	0	166	0	1,726	0	1,455	0	1,577	3/	3/
Brazil	10,151	3,783	9,325	6,909	15,631	2,478	5,406	4,169	2,321	5,000
Chile	23,335	769	13,150	2,109	16,512	2,171	12,906	1,215	18,258	2,266
Colombia	36	59	1	1,874	0	2,158	0	2,384	0	538
Ecuador	132	0	3/	3/	3/	3/	3/	3/	3/	3/
Falkland Islands	4,084	0	3,340	0	3,364	0	3/	3/	3/	3/
Peru	5,130	0	972	22	544	11	1,671	0	6,821	0
Uruguay	105,478	0	148,541	0	120,971	0	106,647	0	215,967	0
Total	454,035	4,798	551,723	12,640	575,224	8,273	337,892	9,345	571,343	7,804
AFRICA										
Algeria	12,822	0	192	7,520	198	7,912	264	1,947	2,978	644
Egyptian Sudan	3/	3/	42	33	20	22	3/	3/	3/	3/
Kenya and Uganda	3/	3/	909	0	894	0	1,027	474	3/	3/
Egypt	4,489	0	1,646	1,369	974	1,616	329	1,739	534	1,153
French Morocco	10,036	0	2,590	5,261	3/	3/	882	1,984	13,227	110
Tunisia	4/ 3,241	0	0	230	0	306	3/	3/	22	0
Union of South Africa	228,555	0	220,400	0	225,300	0	201,479	0	196,915	0
Total	259,143	0	225,788	14,413	227,400	9,863	205,631	6,144	213,676	1,907
OCEANIA										
Australia	821,740	0	948,000	0	1,054,000	0	1,162,000	0	1,116,462	0
New Zealand	273,618	0	385,000	0	416,000	0	412,000	0	392,814	0
Total	1,095,358	0	1,333,000	0	1,470,000	0	1,574,000	0	1,509,276	0
World total	2,154,962	2,321,662	2,295,927	2,540,761	2,484,507	2,592,463	2,316,338	2,447,970	2,595,891	2,636,715

1/ Preliminary. 2/ Less than 500 pounds. 3/ Not available. 4/ Four year average 1935-38. 5/ Beginning April 1938, trade between Austria and Germany no longer reported as foreign trade in Germany Statistics. The same applies to trade between Czechoslovakia for the period October to December 1938. 6/ Imports for western Germany commencing September 1947. 7/ Two year average. 8/ Present territory. 9/ Based on exports from primary sources. 10/ Included in Syria. 11/ Included in India.

Office of Foreign Agricultural Relations. Prepared or estimated from official statistics of foreign governments, reports of U. S. Foreign Service officers and other information.--July, 1951



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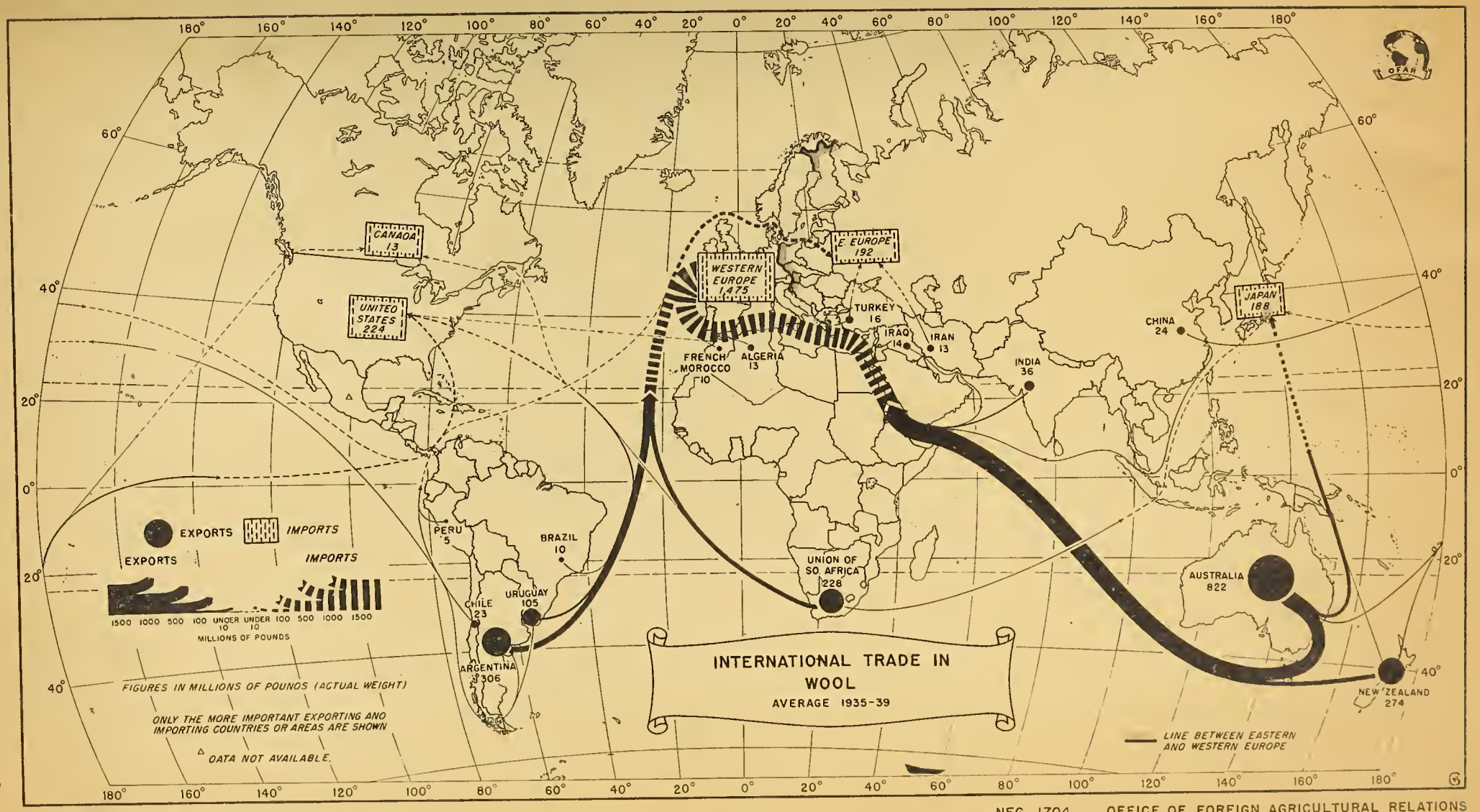

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UNITED STATES DEPARTMENT OF AGRICULTURE
WASHINGTON, D.C.

FW 5-51

November 26, 1951

WORLD WOOL PRODUCTION IN 1951

World wool production in 1951 is estimated at approximately 4,070 million pounds, an increase of 60 million pounds over the revised 1950 output, according to the customary fall summary of the Office of Foreign Agricultural Relations.

This estimate is approximately 4 percent above the 1936-40 average of 3.9 billion pounds and about 30 million pounds greater than the World War II average. The current estimate which includes both apparel and carpet wool and is on a grease basis is 2 percent under the June report which forecast the Southern Hemisphere clip in which some change has been made, especially in the case of Australia.

The estimated 40 percent million pounds of greasy wool is expected to yield about 2,270 million pounds of clean fiber. To this could be added 100 million pounds of unmarketed wool from the previous season. This would give a supply of 2,370 million pounds without further deterioration of mill stocks. On the other hand world consumption has averaged about 2,500 million pounds the past 3 years.

Only slight increases in world wool production can be expected in the years immediately ahead. On the other hand the extension of adverse conditions in Australia or the development of adverse conditions in other important producing countries, which are not uncommon, might reduce available supplies.

World wool production in the decade 1921-30 averaged about 3,400 million pounds but by the end of the period was at 3,700 million pounds. This level was maintained through the early 'thirties, dropped considerably from 1933 through 1936 and rose to a level of 4,180 million pounds by 1940. The average for the 1931-40 period was about 3,780. The upward trend reached an all-time peak of 4,200 million pounds in 1941. Under wartime conditions, which saw fixed prices, devastation in Europe, and large accumulation of wool in the Southern Hemisphere by virtue of closed markets in Western Europe, world production began to decline and had by 1945 and 1946 apparently

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Based upon estimates of the spring clip in the Northern Hemisphere combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. Late each spring an estimate is made of the Northern Hemisphere clip, plus a forecast for the Southern Hemisphere. Data, especially for the Southern Hemisphere, are reviewed at this time each fall.

WOOL: Production in specified countries, greasy basis, averages 1936-40 and 1941-45; annual 1947 to 1951 1/

Continent and country	Averages 1936-40	Averages 1941-45	1947	1948	1949	1950 2/	1951 2/
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds
NORTH AMERICA							
Canada	15.6	17.7	14.1	11.9	9.8	9.5	8.9
Mexico	10.3	10.4	10.5	11.3	11.5	13.2	15.2
United States							
Shorn	360.6	360.2	252.8	233.9	216.9	220.1	229.1
Pulled	64.7	68.3	56.6	46.6	35.6	32.4	30.9
Total	425.3	428.5	309.4	280.5	252.5	252.5	260.0
Estimated total 3/	451.7	457.3	334.5	304.4	274.5	275.9	284.6
EUROPE							
Austria	2.1	2.7	2.6	3.1	3.6	3.0	3.5
Bulgaria	28.7	26.4 4/	26.4 4/	27.0 4/	27.0 4/	27.0 4/	28.0
Finland	2.7	1.9	2.4	3.3	3.7	4.0	4.4
France 5/	37.1	27.3	28.6	29.3	33.9	35.0	36.4
Germany 6/	31.7	35.5	25.4	26.8	29.0	27.0	27.0
Greece	19.3	12.8	19.1	18.2	17.1	16.5	19.4
Hungary	12.9	8.9	4.4	5.4	5.9	6.8	-
Ireland	17.2	15.2	13.3	12.2	12.0	13.7	14.0
Italy	30.4	27.5	27.1	28.9	35.3	35.0	36.4
Netherlands	6.2	4.9	4.6	4.6	6.2	6.5	6.5
Norway	5.9	5.9	5.7	6.2	6.8	7.3	7.5
Poland and Danzig	6.8	-	-	-	-	-	-
Portugal	16.3	17.2	18.0	18.0	17.0	21.2	22.0
Rumania 6/	40.7	-	-	-	-	-	-
Spain	70.0	83.0	77.0	88.0	82.0	100.0	100.0
United Kingdom	110.1	88.6	71.8	75.0	82.5	86.0	88.0
Yugoslavia	34.7	-	-	-	-	-	-
Estimated total (excl. U.S.S.R.) 7/	483.4	446.0	397.7	424.5	444.4	474.8	488.4
U.S.S.R. (Europe & Asia) 6/9/	310.2	7/ 279.7	285.8	304.6	314.9	325.0	335.0

ASIA							
Iran	36.3	29.6	30.0	29.8	24.7	32.6	34.2
Iraq	21.6	21.1	24.2	32.7	26.7	28.7	30.0
Syria 10/	10.7	11.0	12.7	12.1	10.0	13.0	15.0
Turkey	67.7	67.9	71.2	75.5	70.9	67.2	73.0
Afghanistan	15.0	15.0	15.0	17.0	17.2	18.0	18.0
China 11/	88.0	81.0	75.0	75.0	75.0	75.0	75.0
India 12/	72.9	12/ 79.0	54.5	53.0	46.2	50.5	52.0
Pakistan	-	-	26.0	26.0	30.0	35.0	40.0
Estimated total 13/	344.2	336.7	341.8	354.7	347.2	366.9	383.8
SOUTH AMERICA							
Argentina 14/	411.0	505.8	475.0	419.0	420.0	420.0	451.9
Brazil 15/	35.5	37.6	43.0	45.2	48.5	47.4	49.6
Chile	32.6	38.6	41.9	41.9	46.3	44.0	44.0
Falkland Islands	4.0	4.2	4.0	4.2	4.3	4.7	4.8
Peru	19.4	17.6	15.9	17.2	18.7	19.8	20.5
Uruguay	126.2	144.0	150.3	144.0	163.3	180.8	187.4
Estimated total 16/	638.9	759.5	743.6	685.0	712.7	728.3	769.8
AFRICA							
Algeria	22.6	22.6	13.8	13.2	14.0	17.0	19.0
Egypt	7.5	5.9	5.6	7.7	6.4	8.0	6.6
French Morocco	35.1	39.4	25.0	28.0	30.0	33.1	35.3
Libya	-	3.2	3.4	1.0	1.7	1.6	-
Tunisia	12.0	12.9	11.0	7.9	8.0	11.0	12.0
Union of South Africa 17/	252.3	234.0	205.2	219.0	217.5	227.5	245.0
Estimated total 18/	336.8	321.9	267.8	280.6	281.4	302.0	324.7
OCEANIA							
Australia	1,051.9	1,088.0	973.0	1,031.0	1,109.0	1,160.0	1,110.0
New Zealand	313.8	350.4	362.0	367.0	390.0	372.0	374.0
Total	1,365.9	1,438.5	1,335.1	1,398.1	1,499.1	1,532.1	1,484.1
Estimated world total 19/	3,930.0	4,040.0	3,710.0	3,750.0	3,870.0	4,010.0	4,070.0

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Mexico, Newfoundland, Netherlands West Indies, Guatemala and El Salvador. 4/ Includes Southern Dobrudja beginning 1944. 5/ Data for years 1945 and 1946 not comparable with prewar and 1947. 6/ Based on present boundaries. 7/ Two years average (1944 and 1945). 8/ Includes estimates for Albania and for countries producing 2 million pounds or less, namely Belgium, Czechoslovakia, Denmark, Iceland, Sweden and Switzerland. 9/ Based on the number of sheep and an average fleece weight of 4.7 pounds per head. 10/ Includes Lebanon. 11/ Includes China proper (22 provinces), Manchuria, Jehol and Sinkiang (Turkestan). Figures for postwar years of 75 million pounds used only to indicate approximate level. 12/ Includes Pakistan. 13/ Includes estimates for Cyprus, Palestine and Transjordan, Outer Mongolia, Tibet and Nepal. 14/ Based on estimates of the Buenos Aires Branch, First National Bank of Boston through 1947. 15/ Estimates based largely on production in Rio Grande do Sul, which produces about 80 percent of the total. 16/ Includes relatively small production in Bolivia, Colombia, Ecuador, Paraguay and Venezuela. 17/ Union of South Africa, Union Protectorates and South West Africa. 18/ Includes estimates for Kenya, French West Africa and Togo. 19/ Rounded to tens of millions.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates for countries having changed boundaries have been adjusted to present boundaries except as noted. November, 1951.

stabilized at about the level of the late 'thirties. Decreased production in the United States because of higher returns from cattle and grain production contributed substantially to the decline in this period. Serious drought in some of the major producing countries of the Southern Hemisphere caused a further drop that lowered the 1947 output to 3,710 million pounds. Since 1947, with favorable weather conditions and an upward price trend, production has continued to increase and in 1951 is only about 60 million pounds below the 1941 peak.

Production in some of the major countries in 1951, compared with the peak year of 1941, shows some significant contrasts. Australia produced about 1,110 million pounds in 1951 compared with 1,167 in 1941, while New Zealand showed an increase of 30 million pounds. Uruguay has made the largest increase, with a gain of 70 million pounds over the 1941 output which was, however, a low-year for that country.

On the other hand, South African production in 1951 is about 15 million pounds under 1941, Argentina had a decrease of about 40 million pounds, and the United States shows a striking reduction of about 190 million pounds. Europe including the United Kingdom, but not including the Soviet Union, produced about the same in 1951 as in 1941.

Current Season:

Unfavorable weather in the summer and fall months preceding shearing for the current season in Australia resulted in some decrease in the 1951-52 clip, which is now placed at 1,110 compared with 1,160 million pounds last season. Floods in Queensland and New South Wales, two of the most important wool producing States, last year resulted in losses in sheep numbers because of drowning, pests, and decreased lambing. Although sheep numbers on March 31, 1951 were up about 2 percent over 1950, the effect of late shearing a year ago and poor forage conditions in some areas caused a decrease in the average fleece weight for the current season. The grease weight of the 1950-51 clip has been adjusted down slightly, but the better-than-average clean yield more than offset this so that the outturn of clean wool is actually higher than previously set.

Production in New Zealand of 374 million pounds, although not up to the peak of 390 million pounds produced in 1949, represented a slight gain over 1950 and is well above the 1936-40 and 1941-45 averages. The Union of South Africa had another year of favorable weather, such as has prevailed since the 1947-48 season. Good grazing has resulted in increased number of lambs saved, and higher yield per animal, bringing production in 1951 to the higest since 1943-44.

South America has had generally favorable conditions and wool production has been maintained or increased in all countries. In Argentina, the high level of wool prices a year ago, especially in comparison to meat, lead to the retention of lambs and ewes for wool production. As a result the current clip of 451.9 million pounds is substantially above a year ago. Most of the increase has taken place in low crossbred wool which will account for about 27 percent of the total. Fine and medium wool account for 56 percent and merino wool about 17 percent. Reports from Uruguay indicate a 4 percent increase over 1950 wool production.

Production in North America in 1951 made a slight gain over 1950, reflecting for the most part a gain in output in the United States and Mexico. The expected gain in Canadian wool did not materialize but instead a slight decrease was registered.

European output this year made some gain over 1950 and is, for the first time since World War II, above the 1936-40 average. The change was not great for any one country but general improvement was noted throughout. Information on wool production in the Soviet Union and China is limited but has been incorporated to the extent to which it is available.

In Asia further increase in production was noted as that area responded to several years of good prices for coarse wools. Pakistan, Turkey, Iran and Iraq made substantial increases in 1951 over 1950.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. It is based in part upon U.S. Foreign Service reports.

USDA, BUR OF AGR'L & IND. CHEM.
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